

## Employee registration

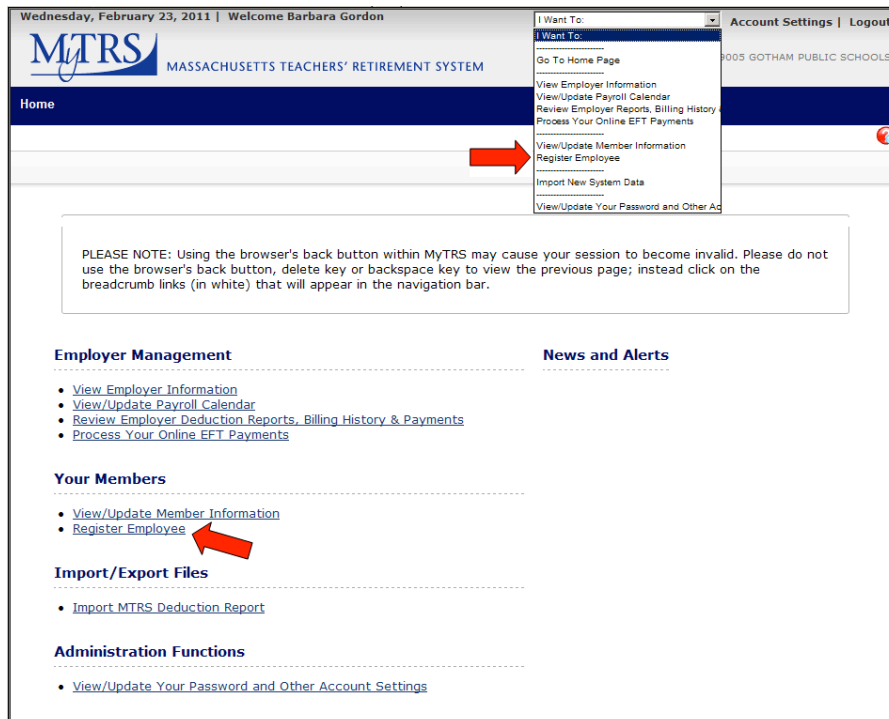
In this guided practice, you will learn how to:

- register an employee as an MTRS member,
- print an MTRS enrollment sheet, and
- correct an existing registration.

## Registering an employee

**Note** There is a **1-day** waiting period after an employer registers an employee before that employee is allowed to enroll.

- 1) Log in to MyTRS using your assigned username and password.
- 2) On the *Home* page, select the **Register Employee** link from either the Your Members section or the **I Want To:** pull-down field.



The *Register Employee* window appears. This window contains three tabs:

- ☐ *Demographics*
- ☐ *Additional Information*
- ☐ *Employment*

The window defaults to the *Demographics* tab.

The screenshot shows the MyTRS (Massachusetts Teachers' Retirement System) interface. At the top, it displays the date 'Friday, February 11, 2011', a welcome message 'Welcome Barbara Gordon', and navigation links for 'Account Settings' and 'Logout'. The main header identifies the system as 'MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM' for '9005 GOTHAM PUBLIC SCHOOLS'. Below this, a breadcrumb trail shows 'Home » Your Members » Register Employee'. The 'Demographics' tab is selected, with 'Additional Information' and 'Employment' tabs also visible. The employer is listed as '9005 GOTHAM PUBLIC SCHOOLS'. A message box indicates that after registration, additional employees can be registered by returning to this screen and clicking the 'Reset' button. The 'Member Information' section contains input fields for SSN (yellow), Prefix (dropdown), First Name (yellow), Middle Name (white), Last Name (yellow), and Suffix (dropdown). At the bottom, there are 'Save and Continue' and 'Reset' buttons, and a note that an asterisk denotes a required field.

- 3) Enter the employee's information in the required yellow fields (and any other desired fields) and click **Save and Continue**. MyTRS will then automatically open the next tab (window) required by the three-step registration process. The next section of this guide will describe each step in detail.

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**Note** To clear the data on the screen and/or cancel the registration process, click **Reset**.

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## Entering employee demographics

Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

Demographics | Additional Information | Employment

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(2)**  
 Registering employee.  
 After the registration for this employee is complete you can register additional employees by returning to this screen and clicking the Reset button.  
 The Member Information fields will be cleared.

**Member Information**

SSN: 999110020 \* Prefix: Ms. First Name: Sapling \* Middle Name: B Last Name: Noah \* Suffix:

Save and Continue Reset

\* Denotes Required Field

- 1) Enter the employee's **SSN** (Social Security number) (e.g., 999-11-0020).
- 2) Optionally, select a **Prefix** from the pull-down field.
- 3) Enter the employee's **First Name** (e.g., Sapling).
- 4) Optionally, enter the employee's **Middle Name** (e.g., Branch) or middle initial (e.g., B).
- 5) Enter the employee's **Last Name** (e.g., Noah).
- 6) Optionally, select a **Suffix** from the pull-down field.
- 7) Click **Save and Continue**. The *Additional Information* tab opens.

**Note** Remember, you can click **Reset** to clear the registration process, if necessary.

## Entering a new employee who is an existing MTRS member

If the SSN you enter belongs to an existing MTRS member, a message will appear asking if this is the person you want to enroll. When this happens, you will need to either choose to re-enter the member's Social Security number or use the existing record found in MyTRS.

If you choose to use an existing record because your employee has previous MTRS service, you will not be able to update certain demographic data such as your employee's name. Your employee can make corrections as needed while enrolling.

If this box appeared because of a typo while entering the Social Security number, click **Re-enter SSN** and enter the correct number.

**Note** If your new employee is an existing member, you will not be able to change his or her name as it exists in MyTRS. However, the member can update his or her name when enrolling online.

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM

Home » Your Members » Register Employee

Demographics Additional Information Employment

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(2)**  
Registering employee.  
After the registration for this employee, the Member Information fields will be updated.

**Existing Person Found**  
The SSN that you have entered is already being used by the following person(s).

SSN	Name
XXX-XX-0014	HISTORY, HANK

**Do you wish to?**

☒ Re-enter SSN  
☐ Use existing record

OK

**Member Information**

SSN: 999-11-0014 \* Prefix:

\* Denotes Required Field

## Entering additional information

The *Additional Information* tab contains questions about employee certification. When the window opens, a question appears. After you answer the initial question, additional fields appear based on your response.

Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

Demographics Additional Information Employment

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(1)**  
Registering employee.

**Additional Information**

Is this employee required to be certified by the Massachusetts Department of Elementary and Secondary Education (DESE; formerly DOE) or Board of Allied Health Professionals as a condition of employment?

Yes No

Save and Continue Reset

- 1) Select **Yes** or **No** from the pull-down field for the question about certification.

If you answer:

- ☐ **No**, click **Save and Continue**, and the next tab, the *Employment* window opens.
- ☐ **Yes**, the **Teaching Certification Status** field appears.

The four options in the **Teaching Certification Status** field and the next steps for each are:

- ☐ Not certified: click **Save and Continue**
- ☐ Certification is currently pending: click **Save and Continue**
- ☐ Received a waiver: click **Save and Continue**
- ☐ Certificate has been issued: additional fields will appear, and you will need to complete them

Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

Demographics Additional Information Employment

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(1)**  
Registering employee.

**Additional Information**

Is this employee required to be certified by the Massachusetts Department of Elementary and Secondary Education (DESE; formerly DOE) or Board of Allied Health Professionals as a condition of employment? Yes \*

Teaching Certification Status: \*

- Not certified
- Certification is currently pending
- Received a waiver
- Certificate has been issued

Save and Continue Reset

- 2) If you selected **Certificate has been issued** in the **Teaching Certification Status** pull-down field, the window refreshes and displays additional fields.

Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

Demographics Additional Information Employment

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(1)**  
Registering employee.

**Additional Information**

Is this employee required to be certified by the Massachusetts Department of Elementary and Secondary Education (DESE; formerly DOE) or Board of Allied Health Professionals as a condition of employment? Yes \*

Teaching Certification Status: Certificate has been issued \*

If issued, the certification number is: 456789 \*

and it was issued on (mm/dd/yyyy): 11/13/2008 \*

by: DESE (DOE) \*

DESE (DOE)  
Board of Allied Health Professionals  
Other

Save and Continue Reset

- 3) Enter the certification number.

If issued, the certification number is: 456789 \*

and it was issued on (mm/dd/yyyy): 11/13/2008 \*

by: \*

- 4) Enter the date on which the certification was issued.

and it was issued on (mm/dd/yyyy): 11/13/2008 \*

by: \*

- 5) Select the name of the organization that issued the certification from the **by:** pull-down field (**DESE [DOE]**, **Board of Allied Health Professionals**, or **Other**).

by: \*

DESE (DOE)  
Board of Allied Health Professionals  
Other

Save and Continue Reset

- 6) Click **Save and Continue**. The *Employment* window appears.

## Entering employment

The *Employment* window requires that you provide the employee's position, employment status, and payroll deduction information.

Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

Demographics Additional Information **Employment**

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(1)**  
Registering employee.

**New Employment**

Employee's start date for this position:  \*

Position:  \*

Employment status as a percentage of full-time:  \*

Note: Less than half-time is ineligible for membership unless employee is also employed by another district. Also, part-time and temporary employees are subject to a six-month waiting period, unless they have funds on account with the MTRS or another Massachusetts retirement system.

Date of first payroll deduction:  \*

Is this employee either temporary or a long term substitute?:  \*

\* Denotes Required Field

- 1) Enter the employee's first MTRS-eligible date of work in the **Employee's start date for this position** field.

Employee's start date for this position:  \*

Position:  \*

Employment status as a percentage of full-time:  \*



- 2) Select the **Position** in the pull-down field.

Employee's start date for this position: 09/01/2010 \*

Position: \*

Employment status as a percentage of full-time: \*

Eligible for membership unless employed by another district. Also, part-time employees are subject to a six-month waiting period on account with the MTRS or retirement system.

Date of first payroll deduction: \*//\* \*

Is this employee either temporary or a long term substitute?: \*

Save

- Teacher
- Kindergarten Teacher
- Principal
- Assistant Principal
- Nurse
- Business Administrator
- Charter School Leader
- Collaborative Director
- Superintendent
- Assistant Superintendent
- Psychologist/Psychiatrist
- Social Worker**
- Adjustment Counselor
- Guidance Counselor
- Physical Therapist
- Occupational Therapist
- Librarian
- Speech Pathologist/Therapist
- Other
- Coach

- 3) Enter a percentage in the **Employment status as a percentage of full-time** field (e.g., if full-time, enter 100; if half-time, enter 50).

Employment status as a percentage of full-time: 80 \*

Eligible for membership unless employed by another district. Also, part-time employees are subject to a six-month waiting period on account with the MTRS or retirement system.

Date of first payroll deduction: \*//\* \*

- 4) Enter the date of the employee's first payroll deduction of MTRS contributions in the **Date of first payroll deduction** field.

Date of first payroll deduction: 03/04/2011 \*

Is this employee either temporary or a long term substitute?: \*

- 5) If the employee is either a temporary employee or a long-term substitute, select **Yes** from the pull-down field; if not, select **No**.

Is this employee either temporary or a long term substitute?:  \*

Yes  
No

Save Reset

- 6) Click **Save**.

The “New employment information has been saved” message displays, and the **Print** button appears.

**Note** If you are registering multiple employees, you must make sure to click **Reset** between registrations, or you may overwrite your previous registration.


Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

Demographics Additional Information Employment

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(1)**  
New employment information has been saved. 

**New Employment**

Employee's start date for this position: 09/01/2010 \*

Position: Social Worker \*

Employment status as a percentage of full-time: 80 \*

Note: Less than half-time is ineligible for membership unless employee is also employed by another district. Also, part-time and temporary employees are subject to a six-month waiting period, unless they have funds on account with the MTRS or another Massachusetts retirement system.

Date of first payroll deduction: 03/04/2011 \*

Is this employee either temporary or a long term substitute?: No \*

Save Reset Print

\* Denotes Required Field

Reset

## Printing the MTRS enrollment assignment sheet

After the employment information saves, print a copy of the MTRS Enrollment Assignment Sheet for your employee. We recommend also saving a printed or electronic copy for your own files.

**Note** If you need to generate a new Enrollment Assignment Sheet, you will need to re-register your employee after closing the assignment sheet.

Administrator 3/6/11 11:30 AM

**Comment [1]:** DP – can we also have a section on Saving the assignment sheet?

1) Click **Print**.

Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

Demographics Additional Information Employment

Employer: 9005 GOTHAM PUBLIC SCHOOLS

**Messages(1)**  
New employment information has been saved.

**New Employment**

Employee's start date for this position: 09/01/2010 \*

Position: Social Worker \*

Employment status as a percentage of full-time: 80 \*

Note: Less than half-time is ineligible for membership unless employee is also employed by another district. Also, part-time and temporary employees are subject to a six-month waiting period, unless they have funds on account with the MTRS or another Massachusetts retirement system.

Date of first payroll deduction: 03/04/2011 \*

Is this employee either temporary or a long term substitute?: No \*

Save Reset Print

\* Denotes Required Field

The MTRS Enrollment Assignment Sheet, a pdf document, displays.

Friday, February 11, 2011 | Welcome Barbara Gordon | I Want To: | Account Settings | Logout

**MTRS** MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » Register Employee

https://v3uat.trb.state.ma.us/uattest/app?service=external/Client:MemberEnrollmentAssignmentSheet&sp=T

1 (1 of 1) 83.6% Find

**MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM**

## MTRS Enrollment Assignment Sheet

Employee Name: Ms. Sapling B Noah Employee SSN: 999 - 11 - 0020

Employer Contact: Barbara Gordon Employer Phone: (617) 679-6877

Employer Title: Payroll Officer Employer E-mail: mytrsuser@gmail.com

Registration Submitted Date: 02/11/2011

Version 6.0 ■ July 2009


Enrollment is a benefit and a very important part of your financial future—the MTRS is your employer's

- 1) School district's four-digit MTRS agency code ..... 9005
- 2) Employee's start date for this position ..... 09/01/2010
- 3) Position ..... Social Worker
- 4) Is this employee required to be certified by the Massachusetts Department of Elementary and Secondary Education (DESE; formerly DOE) or Board of Allied Health Professionals as a condition of employment? ..... ☐ No ☒ Yes
- 5) Teaching certification ..... Certificate has been issued

If Issued, the certification number is ..... 456789

and it was issued on (mm/dd/yyyy) ..... 11/13/2008

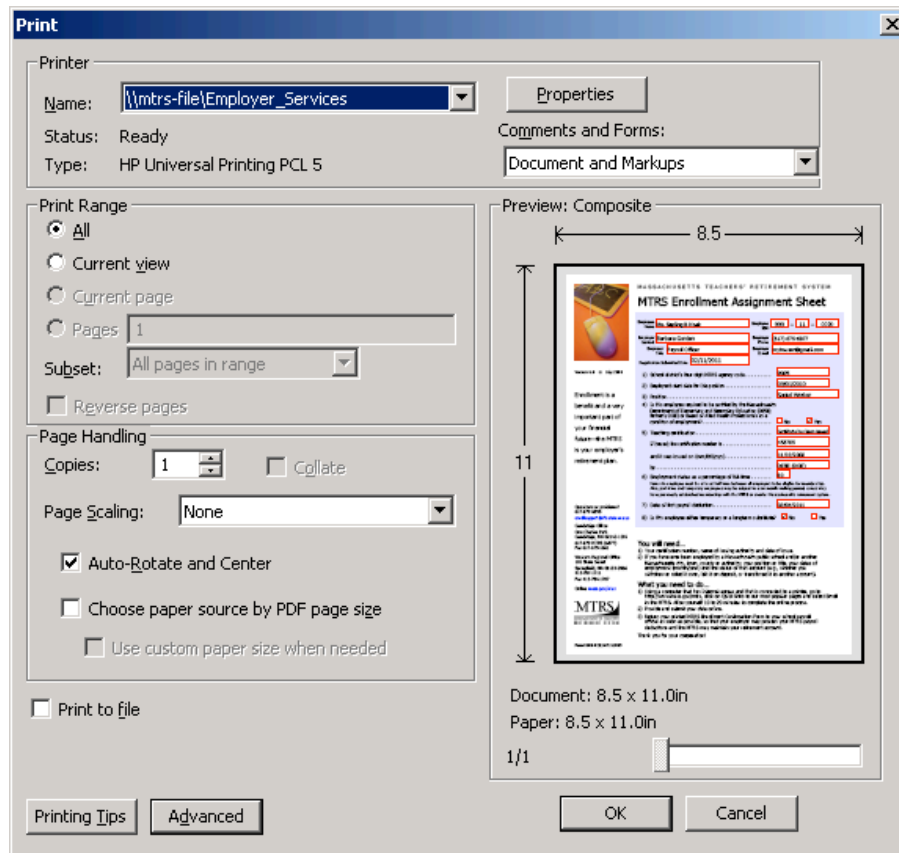
Done Internet 100%

**Note** If you would like to save the registration form electronically, click the save icon (  ) and choose where to save your form in the **Save as** window.

2) Click the **Print** icon to open the *Print* pop-up window.

- 3) Select the desired printer and number of copies, and click **OK** to print the assignment sheet. You should print two copies: one for your files and one for the employee.

**Note** Your print view may be different from what is shown here.



The *Print* window closes and the document prints.

- 4) Click the **X** to close the *MTRS Enrollment Assignment Sheet* pop-up window.

MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM

## MTRS Enrollment Assignment Sheet

Employee Name: Ms. Sapling B Noah Employee SSN: 999 - 11 - 0020

Employer Contact: Barbara Gordon Employer Phone: (617) 679-6877

Employer Title: Payroll Officer Employer E-mail: mytrsuser@gmail.com

Registration Submitted Date: 02/11/2011

Version 6.0 July 2009

Enrollment is a benefit and a very important part of your financial future—the MTRS is your employer's retirement plan.

Questions or problems?

- School district's four-digit MTRS agency code: 9005
- Employee's start date for this position: 09/01/2010
- Position: Social Worker
- Is this employee required to be certified by the Massachusetts Department of Elementary and Secondary Education (DESE; formerly DOE) or Board of Allied Health Professionals as a condition of employment?
  - ☐ No
  - ☒ Yes
- Teaching certification: Certificate has been issued
  - If Issued; the certification number is: 456789
  - and it was issued on (mm/dd/yyyy): 11/13/2008
  - by: DESE (DOE)
- Employment status as a percentage of full-time: 80
 

Note: An employee must be at least half-time between all employers to be eligible for membership. Also, part-time and temporary employees may be subject to a six-month waiting period, unless they have previously established membership with the MTRS or another Massachusetts retirement system.
- Date of first payroll deduction: 03/04/2011

Done Internet

- 5) To register another employee, click **Reset** to clear any data from the window and repeat these steps.

The employment registration process is complete.

**Note** There is a **1-day** waiting period after an employer registers an employee before that employee is allowed to enroll.

## Correcting an existing employee registration

If you find a data entry error after saving an employee's registration and printing the assignment sheet, you can correct the registration by re-registering your employee through the registration process described above.

Registrations can only be corrected if the following is true:

- The **Employer Code** matches the member employment record,
- the **Enrollment Status** is "Pending Enrollment," and
- the most recent **Member Event** is "Contributing."

If you are not sure if the above criteria are true, check your employee's *Member Employment* screen in MyTRS.

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**Note** You cannot change the Social Security number for an existing member record. Contact your Employer Services Representative to request this type of change. Please do not create a duplicate account by automatically registering your employee again under the correct SSN.

**Note** None of the information you previously entered on the *Additional Information* or *Employment* tabs for the member displays. To correct the information previously submitted, you must re-enter all the registration information for the employee.

**Note** There is a **1-day** waiting period after an employer registers an employee before that employee is allowed to enroll.

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You have completed this guided practice.